



# Transition *Plan* Checklist



# Introduction

If you or your organization is in the process of transitioning, implementing change can be challenging. Therefore, it is necessary to have effective leaders leading the transition. Leaders should stimulate and empower their followers to achieve extraordinary outcomes.

## Purpose

The purpose of this Transition Plan is to describe the processes and activities required for implementing change. This transition plan is designed to provide stability for existing processes, services, and minimal service disruption.

## Objective

The objective of this plan is to establish the framework which will be used to ensure a successful transition.

## Scope

The scope of this Transition Plan includes the transition of organizational change. This transition plan describes the following:

- An approach for managing transition
- Identify dependencies and assumptions for change
- Transition risks and risk mitigation recommendations
- Transition schedule including dependencies, proposed task durations and milestones
- Coordination with leadership

## Transition Phases

This transition plan consists of distinct phases that align with the transition path of change. Throughout the phases, activities are designed to minimize risk and establish a firm foundation for the future. This transition plan is represented by four distinct transition phases listed below in Table 1.

Phase	Descriptions
Discovery Zone	Pre-Discovery Planning, Discovery sessions, reviews, interviews, and focus group sessions to understand the current and planned state to assist in determining an effective transition plan.
Transition Planning	Assess the leadership style of the leadership team. Observe the ongoing activities. Develop a plan to incorporate change in operations.
Communication Strategy	Identify acceptable means of communication. Communication includes a variety of methods, meetings, reports, consultations, etc
Stabilization – Post Transition	Through transition readiness checks to ensure stability to move forward with implementation.

**Table 1 – Phase Description**

## Discovery Zone

During Discovery Zone – Pre-Planning, preparation for consultation, initiates the contract, prepares playbook for transition activities, and draft the transition plan. Table 2 summarizes key elements of the Pre-Planning steps.



Transition Elements	Pre-Discovery Steps
Dependencies (required to start)	Consultation <ul style="list-style-type: none"> <li>• As Is</li> <li>• Future State</li> <li>• Culture Norms</li> </ul>
Activities	Evaluations <ul style="list-style-type: none"> <li>• Leadership Assessments</li> <li>• Skills Assessments</li> <li>• Needs Assessments</li> <li>• Risk Assessment</li> <li>• Transition Readiness Review</li> <li>• Due Diligence Assessment</li> </ul>
Requirements (WOC)	Conduct Assessments, Interviews and Focus Groups (depending on size of organization)
Requirements (Clients)	100% Commitment to the process

**Table 2 – Pre-Discovery Steps**

## Phase 1: Discovery Zone

The primary goal of the Discovery Session is to discuss the client's expectations, share WOC's process and schedule a planning session for developing a transition strategy. During the 30 days following the Discovery Session, WOC fortifies its knowledge and understanding of the "as is" state of operations. Table 3 highlights key element of the Discovery steps.

Transition Elements	Discovery Steps
Dependencies (required to start)	Consultation Review <ul style="list-style-type: none"> <li>• As Is</li> <li>• Future State</li> <li>• Culture Norms</li> </ul>
Evaluation Reports	Reports <ul style="list-style-type: none"> <li>• Leadership Assessments</li> <li>• Skills Assessments</li> <li>• Needs Assessments</li> <li>• Risk Assessment</li> <li>• Transition Readiness Review</li> <li>• Due Diligence Assessment</li> </ul>
Requirements (WOC)	Assessment reports, Summarize and analyze Interviews and Focus Groups (depending on size of organization)
Requirements (Clients)	100% Commitment to the process

**Table 3 – Discovery Steps**

## Phase 2: Transition Planning

During this phase WOC reviews and validates the assessment reports and the interviews and focus group analysis received during the Discovery Zone phase and the continuous operations of the organization.

WOC creates a draft transition plan to incorporate changes in leadership, roles, and responsibilities, as well as process and operational changes within the organization. Table 4 summarizes key elements of the Transition planning.

Transition Elements	Transition Planning
Dependencies	<ul style="list-style-type: none"> <li>• Develop Transition Plan Template</li> <li>• Document "As Is State"</li> <li>• Document "Future State"</li> <li>• Document Culture Norms</li> <li>• Risk Strategy</li> </ul>
Evaluations	<ul style="list-style-type: none"> <li>• Review leadership reassignment (if necessary)</li> <li>• Reassignment of staff based on Skills Assessments</li> </ul>
Requirements (WOC)	<ul style="list-style-type: none"> <li>• Understand all the changes that are being made</li> <li>• Create Timeline</li> <li>• Final Transition Checklist</li> <li>• Final Risk Plan</li> </ul>
Requirements (Clients)	Transition Plan Acceptance

**Table 4 – Transition Planning Phase**

## Communication Management Phase

Communication is an essential component of a transition. WOC will provide support and oversight required to effectively and proactively development and implement a communication plan. Table 5 highlights the communication strategy.

Communication Elements	Community Strategy
Dependencies	<ul style="list-style-type: none"> <li>• Transition Plan</li> <li>• Communication Plan Template</li> <li>• Meeting schedule availability</li> </ul>
Transition Meetings	<ul style="list-style-type: none"> <li>• Transition Leadership Meeting</li> <li>• Transition Team Meeting</li> <li>• Staff/Congregation Meeting</li> <li>• Risk Meeting</li> </ul>
Requirements (WOC)	<ul style="list-style-type: none"> <li>• Overall Transition Status</li> <li>• Strategic Direction</li> <li>• Timeline</li> <li>• Risk</li> <li>• Performance /Changes</li> </ul>
Requirements (Clients)	Transition Leadership and Team focus on transition activities, status, risks, issues and communicate with the staff/congregation.

**Table 5 – Communication Management Phase**

## Stabilization – Post Transition Phase

WOC will review the Transition Plan schedule and complete the transition checklist for timing and milestones contained within the Transition Plan.

Scenarios drafted by WOC are designed to demonstrate the stability of transition and performance. Upon completion of transition, WOC will provide a Transition Report and a demonstration that includes the stabilization elements in Table 6.



Stabilization Elements	Stabilization and Post Transition
Dependencies	<ul style="list-style-type: none"> <li>• Transition Plan</li> <li>• Communication Plan</li> <li>• Schedule</li> <li>• Transition Checklist</li> </ul>
Transition	<ul style="list-style-type: none"> <li>• Review transition activities conducted</li> <li>• Listing of new and revised processes</li> </ul>
Requirements (WOC)	<ul style="list-style-type: none"> <li>• Overall Transition Status</li> <li>• Support operations</li> <li>• Lessons learned</li> <li>• Recommendations for successfully completing any remaining tasks</li> </ul>
Requirements (Clients)	<ul style="list-style-type: none"> <li>• Assume full responsibility of transition.</li> </ul>

**Table 6 – Stabilization – Post Transition**